Boundary Setting for Educational Therapists

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Healthy boundaries better inform the practice of educational therapy and are beneficial to educational therapists, parents and guardians, families, educators, allied professionals, and others engaged in a therapeutic relationship. Boundaries that align with core values, professional AET ethics, our well-being, and integrity help us navigate our personal and professional lives. The Boundary Framework presented has six components that may help us set and maintain boundaries in our work.

INTRODUCTION

The Association of Educational Therapists is an international professional organization for educational therapists providing leadership, professional development, and resources to members, clients, allied professionals, and the public. Boundaries are essential to educational therapists because we want to align our practices with our values and ethics. We do this by identifying, implementing, maintaining, establishing, and updating our boundaries through our agreements with our clients. In addition, our boundaries provide guidance for our own self-care and balance.

Most of us need guidance and support in setting and maintaining our boundaries. It is the responsibility of the educational therapist to ensure that appropriate boundaries are maintained in all professional relationships (Jorgenson et al., 1997). We have created a Boundary Framework (Figure 1) to help with this process.
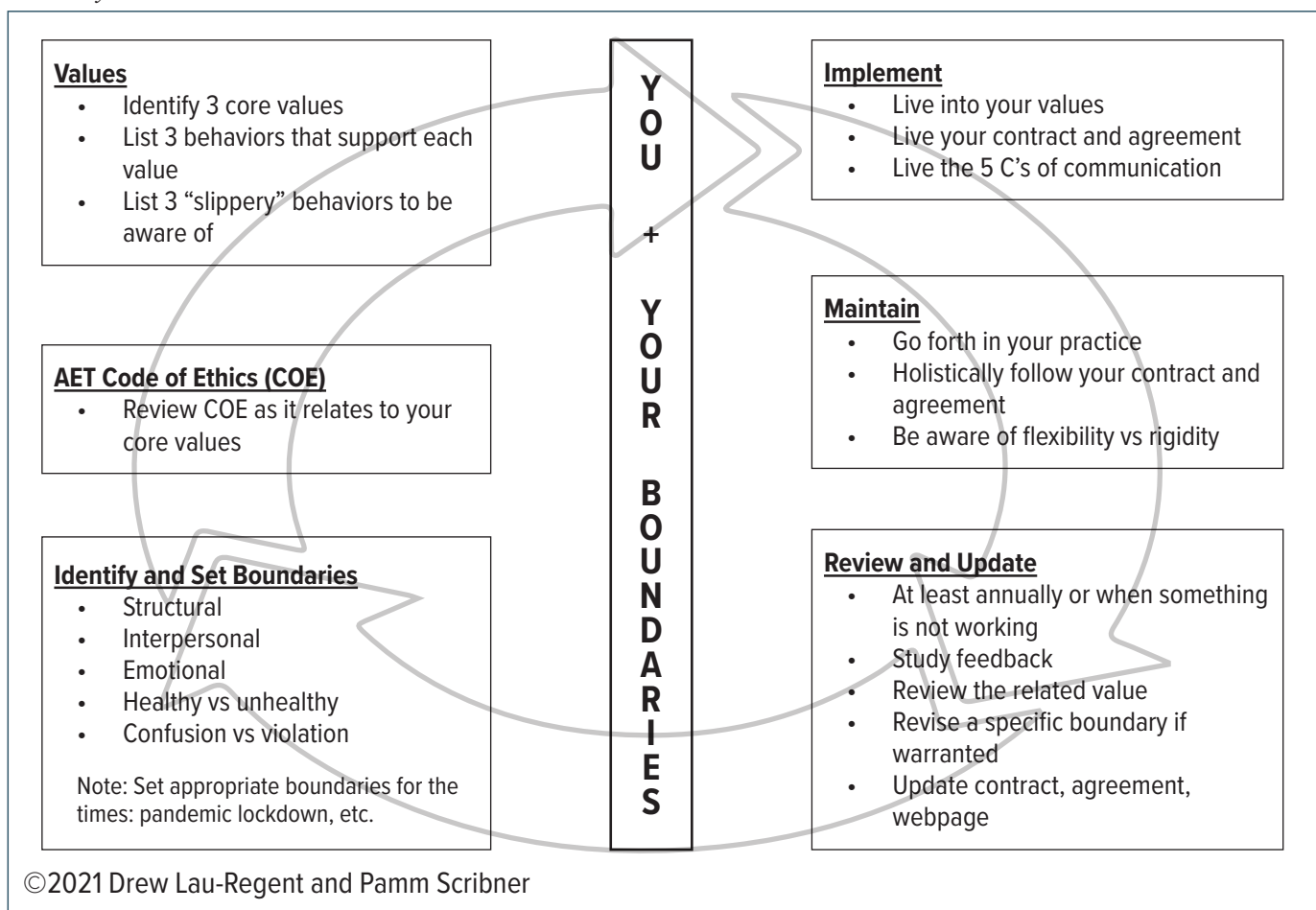
In this participative article,[1] you will be asked to identify one *core value* that you hold. Then, you will list three *supportive behaviors* that reinforce the core value. Next, you will list three behaviors that can move you away from the core value, which we refer to as "*slippery behaviors.*" By doing this work, and considering the case example we provide, you will be better able to adapt the Boundary Framework to your professional life.

THE BOUNDARY FRAMEWORK

The six components of the Boundary Framework are: Values, AET Code of Ethics, Identify and Set Boundaries, Implement, Maintain, and Review/Update.

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[1] You can access a pdf worksheet that you may use as you consider your professional boundaries by clicking here.

Figure 1
Boundary Framework

Values
- Identify 3 core values
- List 3 behaviors that support each value
- List 3 "slippery" behaviors to be aware of

AET Code of Ethics (COE)
- Review COE as it relates to your core values

Identify and Set Boundaries
- Structural
- Interpersonal
- Emotional
- Healthy vs unhealthy
- Confusion vs violation

Note: Set appropriate boundaries for the times: pandemic lockdown, etc.

YOU + YOUR BOUNDARIES

Implement
- Live into your values
- Live your contract and agreement
- Live the 5 C's of communication

Maintain
- Go forth in your practice
- Holistically follow your contract and agreement
- Be aware of flexibility vs rigidity

Review and Update
- At least annually or when something is not working
- Study feedback
- Review the related value
- Revise a specific boundary if warranted
- Update contract, agreement, webpage

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CASE EXAMPLE

To demonstrate the applications of the six components, a fictional case study will be used.

A parent requests a 5 o'clock emergency session for the second time in two weeks because the student is in the midst of an anxiety attack over late assignments, with a deadline the next day. The previous week the ET relaxed the 5 o'clock boundary (and core value necessary for family dinner time) as an opportunity to help the student utilize the strategies they had been working on in their sessions. Flexibility was shown and expressed in this instance because it was a one-time special circumstance. However, the educational therapist, in maintaining a healthy boundary, expresses regret about the current situation, which is starting to look like an unhealthy pattern, and offers the parent several strategies for helping the student meet the deadline while explaining that office hours end at 5 PM. This becomes a teachable moment on healthy boundaries.

VALUES

For the purpose of this exercise, please select one value from the partial list offered in Brené Brown's *Dare to Lead* (2018):

- authenticity
- balance
- courage
- diversity
- family
- financial stability
- growth
- making a difference
- perseverance
- respect
- understanding
- well-being

Now that a *core value* has been selected, list three *supportive behaviors* that reinforce that value. For example, "family" is a core value that we used in our case example. Three behaviors that support the family are reserving one weekend day for family time, preparing and eating dinner together, and attending the children's after-school events. Three *slippery behaviors* that are outside this value may include answering a work call during dinner, catching up on work tasks on the weekend, and talking frequently about work-related topics with family members. Name three *slippery behaviors* that would need to be monitored.

> *By declining to schedule an after-hours appointment, the educational therapist in our case example adhered to their value of "family."*

AET Code of Ethics

According to the Boundary Framework, once values are identified, it is time to refer to the AET Code of Ethics as it relates to your core values. The code of ethics of a profession states the basis for all professional conduct of its members. Guiding principles encourage continued development of the profession and assist in advancing professionalism, promoting discussion, and encouraging research. Members of the Association of Educational Therapists are responsible for upholding and advancing these principles, which are listed here on the AET website, as well as upholding and advancing AET's Vision, Mission, and Core Values, which can be found here on the AET website.

> *Aligning with the signed contract, our case example highlights Section 1.2.B of the AET Code of Ethics which states that an educational therapist will adhere to their contract. The decision to decline an after-hours appointment adheres to the contract that the family and ET agreed to, which states that the office closes at five o'clock.*

Identify and Set Boundaries

Several types of boundaries are discussed in the literature.

Structural boundaries include details such as time and location of appointments and billing practices (Jorgenson et al., 1997). Examples may include the timeliness of client drop-off and pickup, an adult presence in the house during sessions, and limits on who can be alone and for how long in the waiting room. Payment boundaries may include price structuring, due dates and late fees, managing and charging for emails and phone calls, as well as maintaining a reasonable percentage of low-fee clients and pro bono cases. To accommodate illness protocols, educational therapists need to have Zoom procedures and e-practice boundaries in place.

Interpersonal boundaries include concerns such as the exchange of gifts, self-disclosure, physical contact (Sawyer & Prescott, 2010; Wierzbicki et al., 2012), and respecting cultural norms. For example, many educational therapists let families know that they do not accept or give gifts, though they may have a "prize jar" with inexpensive items for students when a goal is reached. Another example is choosing not to self-disclose one's identity with a religion or spiritual practice, or political ideology. In addition, physical boundaries involve one's willingness to engage with physical contact or proximity, whether that is simply sitting next to a client during a session or giving an elbow bump in lieu of a handshake. Although eye contact is a critical component in our work with clients, to some it is considered rude or difficult. Therefore, the earlier that interpersonal boundaries are agreed upon, the better. A boundary crossing may also include sharing too much personal information, such as "friending" clients on Facebook. The increasing use of social media makes it harder to limit access to personal information, which can lead to accidental self-disclosure (Hammond & O'Donovan, 2015). Therefore, educational therapists need to be careful about their media presence when they use social media to promote their practices and to network with other professionals. Setting up separate professional social media accounts and a LinkedIn account is recommended.

Emotional boundaries help to balance work and personal lives to prevent burnout. It takes practice to name and recognize our emotions as we experience them, which sets healthy boundaries that uphold our values in life and work (Brown, 2018). Furthermore, "Emotional boundaries are the limits, or lack thereof, you will place on sharing intimate feelings with others. It also encompasses the emotional energy and labor you can put into certain relationships" (Blum, 2021). For example, saying "I am unable to give my full attention to this right now" is a healthy way to set an emotional boundary.

Healthy vs unhealthy boundaries further help us clarify our values and ethical behavior. A healthy boundary is present when we are aware that it is based on our values, professional AET ethics, our well-being, and integrity. Adhering to healthy boundaries offers clarity with ourselves and shows others that our boundaries support our values. Unhealthy boundary crossing can occur when an educational therapist starts to take care of client needs that belong to a parent's role or habitually puts the needs of others before self. Time management violations can include instances in which a parent habitually does not pick up the child on time from the office or when an educational therapist schedules sessions with clients too closely together and there is an overlap in the waiting room (Kaganoff, 2018). A more challenging situation occurs when a parent disciplines or discusses a client's personal business out loud so that anyone nearby can hear the conversation, violating the client's right to confidentiality. Another example occurs when parents send excessive emails. In general, boundary violations dilute our values.

> *In our case example, the boundary is that the workday ends at 5 o'clock. To hold on to this "family" value, even though the parent is upset and demands a 5 o'clock session, the ET simply and neutrally states that the office closes at 5 o'clock, not allowing themself to take this situation personally.*

Implement

Once values and boundaries have been identified, the next step is *living* our values, implementing our agreement/contract with clients, and using clear communication strategies. It is important for ETs to know that most people are doing the best they can

yet may not have the skills to set boundaries (Brown, 2018). Therefore, the educational therapist has the opportunity to model and teach boundary setting and boundary implementation. Communication is key to implementing boundaries. ETs could incorporate the five "C's" of dynamic communication: Be clear, be concise, provide a compelling request, be curious, and be compassionate (Keates, 2018).

Be clear. Communicate the issue directly without misinterpreting or reacting emotionally, judgmentally, or defensively. Take ownership of your experience and be transparent. Be as clear and objective as possible.

Be concise. Keep your requests direct, simple, and to the point. The less wordy, the better. Don't get caught up in the story—focus on getting your point across in the most succinct manner and moving the conversation forward.

Provide a compelling request. Once you make a request to reinforce or maintain a boundary, you are in negotiations. After communicating a boundary crossing, provide the person with a suggested solution that you would be happy with. Explain that it is just as important for all involved that boundaries exist so that work with the client can be done effectively.

Be curious. Listen to what the other person needs. Once you make a request, be curious about what the other person's issues and objectives are and what they might need to fulfill your request.

Be compassionate. Attempt to understand the other person. Listen carefully and put your assumptions aside. When a person feels heard, they tend to open up more and feel safer and more secure in the conversation, which can lead to a more trusting relationship. Having the ability to understand, recognize, and appreciate the way others feel is crucial to resolving conflict, managing change, and making tough decisions.

> *The case example utilized all five "C's" of communication. The ET was clear when they said, "My contract states that the office closes at 5 o'clock." They were concise in re-stating, "I appreciate you wanting me to work with your child; however, I have family priorities that I value." A compelling request was made, "What other times could your child be available?" Curiosity was shown when the ET asked, "Could you tell me more about the situation, please?" And finally, the ET showed compassion when they said, "It appears that there is not a time that works for both of us. I could help you find someone who has the time frames you are looking for."*

The five "C's" are a tool to support the ET in understanding their client from the client's point of view as a way to keep positive working connections as the ET implements their boundaries.

MAINTAIN

Our next step is to maintain our boundaries so that we stand firm in our values and follow our professional ethics. As we move forward with our work with clients, we practice, practice, practice maintaining our boundaries by holistically following our

agreement/contract. In addition, it is important to understand the difference between being flexible (Blum, 2021) and being rigid (Whitfield, 2010) as we implement and maintain our boundaries. Setting and implementing our boundaries are well and good; however, in reality, we may have pushback on any of our boundaries. An ET can better manage pushback by becoming skilled in receiving and giving feedback.

This is where we maintain our boundaries. Sometimes our boundaries may need to be flexible with our values due to a specific situation. Maintaining our boundaries supports a balance between our personal lives and our professional lives. In addition, maintaining our balance reduces the possibility of burnout so that we can thrive in our chosen profession.

> *In the case example, the ET clearly identified and set boundaries that support the value of family. When push back occurred, the ET maintained the boundary by using the 5 C's of communication. In conversation with trusted colleagues, though, the ET was invited to consider talking with family about taking over meal planning one night a week so that they could meet with this well-established client at 5 o'clock, demonstrating flexibility while maintaining the boundary around family.*

REVIEW AND UPDATE

Boundaries are about clarifying our values rather than trying to control people (Blum, 2021). As a result, we review our values and boundaries at least annually or when something is not working by studying the feedback we receive from clients and trusted colleagues with whom we frequently confer. This reflection may lead to revising an existing boundary or adding a new one. Referring to AET's Code of Ethics is part of this process. Once a boundary is changed or added, then we update our agreement, web page, and other public documents.

> *In our case example, the ET realizes that life is ever-changing. Their own kids get older and need less parent time and more peer time. For example, the office closure time can change one or more times per week as our own family needs change. As a result, the boundary related to office closure time became more flexible. While the ET still wanted to close the office at 5 o'clock three days a week, they were willing to extend the closure time by an hour the other two days.*

Review and updates occur as the situations change.

CONCLUSION

The educational therapist has the opportunity to model and teach boundary identification, implementation, maintenance, and revision because most people are doing the best they can yet may not have the necessary skills to do so.

We are leaders who take the responsibility to speak up about the difficult things we encounter in our work. We do not have all the answers; however, we keep listening and allowing our clients to feel seen and heard. Setting and maintaining boundaries that

align with our values and professional ethics make it easier to keep our professional relationships on track (Brown, 2018). Life is constantly changing, and we, as educational therapists, change with it as needed.

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